

Core Question 3: Is the organization effective and well run?

The Governance and Leadership Performance Framework, outlined in Core Question 3, gauges the academic and operational leadership of schools. Core Question 3 consists of six indicators designed to measure schools on how well their school administration and board of directors comply with the terms of their charter agreement, applicable laws, and authorizer expectations.

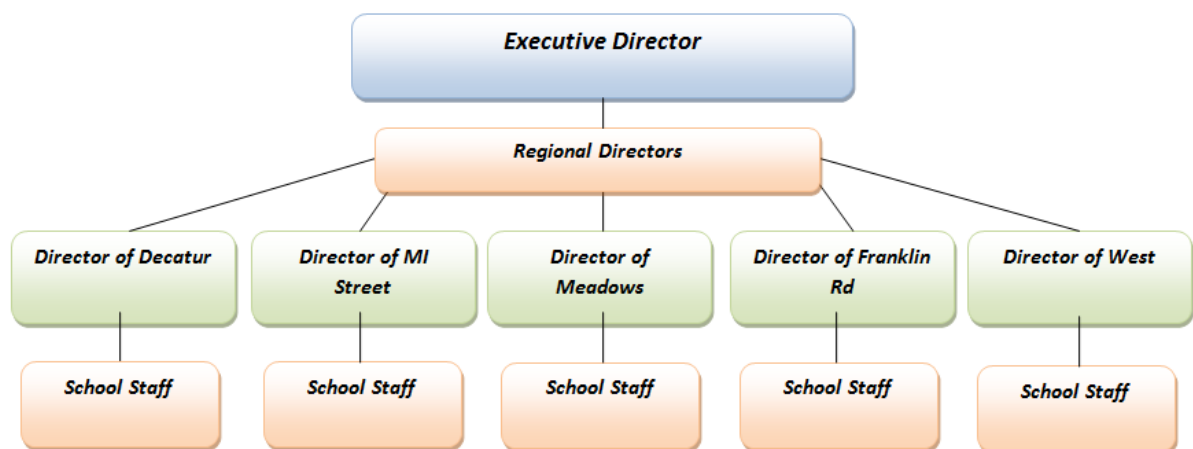
3.1. Is the school leader strong in his or her academic and organizational leadership?							
Indicator Targets	Does not meet standard	The school leader presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.					
	Approaching standard	The school leader presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.					
	Meets standard	The school leader complies with and presents no concerns in the sub-indicators below.					
	Exceeds standard	The school leader consistently and effectively complies with and presents no concerns in the sub-indicators below.					
3.1 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS	MS					
Sub-indicator Ratings	Sub-indicators						Rating
	Demonstration of sufficient academic and leadership experience						ES
	Leadership stability in key administrative positions						AS
	Communication with internal and external stakeholders						ES
	Clarity of roles among schools and staff						MS
	Engagement in a continuous process of improvement and establishment of systems for addressing areas of deficiency in a timely manner						ES
	Consistency in providing information to and consulting with the schools' board of directors						MS

The Excel Center West is part of a network of nine Excel Centers across the state of Indiana. The network has developed a robust leadership team to effectively manage school operations. The Executive Director, a former teacher, coach, and school director with the Excel Center, completed his first full year in the role. He was supported by two Regional Directors, both with backgrounds in school leadership, who worked closely with the school directors in data analysis, problem solving, and professional development. Each building's school director managed the day-to-day operations of the school and implemented network-wide initiatives. The school director has sufficient experience and worked in several capacities at other schools in the network.

before opening The Excel Center West. Like other Excel Center schools, The Excel Center West also has access to the Goodwill Education Initiatives (GEI) staff, which provided additional supports in the areas of finances, operations, data, and curriculum and instruction.

The network experienced significant leadership transition mid-year, in which both of the Regional Directors transitioned to new roles within the network and were replaced by two school directors. Though this did lead to some leadership instability, the network worked quickly to ensure all positions were filled with experienced and capable leaders. The Excel Center West, employs a version of the RISE Evaluation System, which outlines clear roles and responsibilities for teachers and leaders. Additionally, roles and responsibilities of the Executive Director, Regional Director, and School Director were clearly delineated.

Organizational Chart



Internally, the School Director maintained frequent communication with his staff and participated in regular meetings with the Regional Director and other School Directors. The Executive Director and Regional Manager were responsible for the majority of communications with external stakeholders, including the board of directors, Board Chair, Mayor's Office (OEI), GEI, and community partners. Together, they have developed meaningful community partnerships (particularly through local businesses and universities) to directly provide services and supports to the school and its students. The Executive Director provided a thorough report to the board of directors at every meeting that included sections on multiple measures of school performance. Information was consistently accurate, relevant, and timely, and allowed the board to react appropriately to school performance.

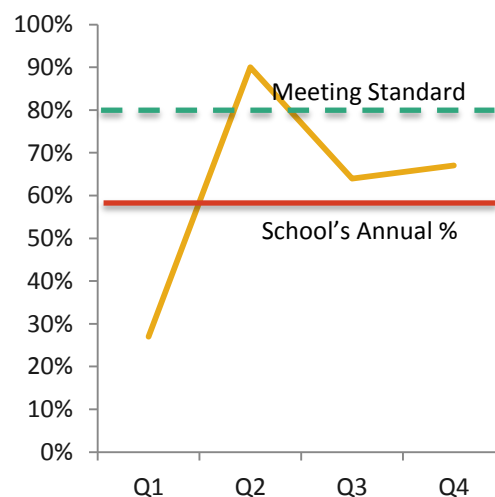
The Executive Director, Regional Director, and School Director consistently reflected on several areas of school data to inform day-to-day decisions. Leaders at all levels of the organization have continued to customize the program offerings at this location to address the specific needs of students and their community.

Overall, the school and network leadership was consistently effective in its organizational and academic oversight and receives a **Meets Standard** for this indicator.

3.2. Does the school satisfactorily comply with all its organizational structure and governance obligations?							
Indicator Targets	Does not meet standard		The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.				
	Approaching standard		The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.				
	Meets standard		The school complies with and presents no concerns in the sub-indicators below.				
	Exceeds standard		The school consistently and effectively complies with and presents no concerns in the sub-indicators below.				
3.2 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS	AS					
Sub-indicator Ratings	Sub-indicators						Rating
	Submission of all required compliance documentation in a timely manner as set forth by the Mayor's Office, including but not limited to: meeting minutes and schedules, board member information, compliance reports and employee documentation						DNMS
	Compliance with the terms of its charter, including amendments, school policies and regulations, and applicable federal and state laws						MS
	Proactive and productive collaboration with its board and/or management organization (if applicable) in meeting governance obligations						AS
	Active participation in scheduled meetings with OEI, including the submission of required documentation by deadlines						MS

During the 2014-2015 school year, one of the Regional Directors was responsible for submitting compliance documents to the Mayor's Office (OEI). While all documents were submitted and all governance obligations were met, there were several occasions when documents were submitted late. The school ended the 2014-2015 year submitting 57% of all academics and governance documents on time.

The Excel Center West maintained compliance with all material sections of its charter and submitted amendments as necessary. However, there were a couple of instances in which the leadership team required a number of reminders to obtain documentation. For instance, the school was over-enrolled versus its charter target for a period of time and took several written reminders and phone calls from OEI before the required amendment was submitted.

On-Time Compliance Reporting Percentage (3.2a)


The Executive Director, Regional Directors, and School Directors were consistently actively engaged in meetings with OEI and maintained frequent communication with OEI between scheduled meetings. However, due to the issues with document submission, The Excel Center West receives an **Approaching Standard** for compliance obligations.

3.3. Is the school's board active, knowledgeable, and does it abide by appropriate policies, systems, and processes in its oversight?							
Indicator Targets	Does not meet standard	The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.					
	Approaching standard	The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.					
	Meets standard	The school complies with and presents no concerns in the sub-indicators below.					
	Exceeds standard	The school consistently and effectively complies with and presents no concerns in the sub-indicators below.					
3.3 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS	MS					
Sub-indicator Ratings	Sub-indicators						Rating
	Timely communication of organizational, leadership, academic, fiscal, or facility deficiencies to the Mayor's Office; or when the school's management company (if applicable) fails to meet its obligations as set forth in the charter						MS
	Clear understanding of the mission and vision of the school						MS
	Adherence to board policies and procedures, including those established in the by-laws, and revision of policies and procedures, as necessary						AS
	Recruitment and selection of members that are knowledgeable, represent diverse skill sets, and act in the best interest of the school and establishment of systems for member orientation and training						MS
	Effective and transparent management of conflicts of interest						MS
	Collaboration with school leadership that is fair, timely, consistent, and transparent in handling complaints or concerns						MS
	Adherence to its charter agreement as it pertains to governance structure						MS
	Holding of all meetings in accordance with Indiana Open Door Law						MS

The board of directors is experienced and is comprised of members who bring a wide range of skillsets including finance, government, education, business, nonprofit leadership, real estate, and community engagement. In an effort to ensure alignment, two representatives from Goodwill Initiatives of Central Indiana (GICI) reside on the board as non-voting, ex-officio members. Many of the directors have served with GICI for several years, as membership has remained very stable.

The board maintained compliance with the vast majority of its bylaws, policies, and procedures during the 2014-2015 school year. However, for the second half of the year it was out of compliance with its bylaws in regards to membership. The board's bylaws indicate that it must have 9 directors. Two members resigned earlier in the year and while the board recruited one new director, there is still one position left to be filled. On the official board roster shared as of July 2015, the board had only 8 active directors. Although the bylaws indicate that the board may take a vote to decrease the size of the board, bylaws submitted for the 2015-16 school year indicate that no such change had been made.

Skill Sets Represented on Board

Education



Business/
Marketing



Finance



Real Estate



Community



Board Overview

Goodwill Education Initiatives, Inc. holds the charter for the Excel Center.

8

Members

majority

Required for Quorum

The Excel board meets bi-monthly.

Goodwill Education Initiatives, Inc. operates 9 Excel Centers across Indiana as well as Indianapolis Metropolitan High School.

The Executive Director and the Chief Operating Officer (COO) of GEI handled the majority of communication between the board and the Mayor's Office and were both proactive in communicating updates and concerns with both parties. Meetings were held as scheduled, met quorum with the majority of directors in attendance at each meeting, and abided by Indiana Open Door Law. No conflicts of interest were noted during the 2014-2015 school year.

Due to its consistent stewardship and governance over Excel Center West, the board receives a **Meets Standard** for this indicator.

3.4. Does the school's board work to foster a school environment that is viable and effective?							
Indicator Targets	Does not meet standard		The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.				
	Approaching standard		The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.				
	Meets standard		The school complies with and presents no concerns in the sub-indicators below.				
	Exceeds standard		The school consistently and effectively complies with and presents no concerns in the sub-indicators below.				
3.4 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS	MS					
Sub-indicator Ratings	Sub-indicators						Rating
	Regular communication with school leadership and/or its management company						MS
	Annual utilization of a performance based evaluation to assess its own performance, that of the school leader, and management organization (if applicable)						AS
	Collaboration with the school leader to establish clear objectives, priorities, and goals						MS
	Interaction with school leader that is conducive to the success of the school, including requesting and disseminating information in a timely manner, providing continuous and constructive feedback, and engaging the school leader in school improvement plans						MS

The Excel Center West board held semi-monthly meetings in which many stakeholders, including representatives from GICI, the Executive Director, Regional Directors, and other relevant staff members, provided thorough reports on school performance. Between meetings, the Executive Director communicated with the COO for GEI and the board chair when necessary to provide leadership and support in school initiatives and events.

The GEI and Excel Center staffs created and managed rigorous priorities and goals for the school. At each board meeting, they provided data to demonstrate the school's progress towards achieving the goals and received feedback from the board. Additionally, the Executive Director met individually with the COO, board chair, and other board members throughout the year to receive more formal feedback and support. At the close of the school year, the Executive Director was responsible for evaluating the Regional Directors and the School Directors. Currently, the board does not have a formal method of setting goals for itself or assessing its own performance, making it difficult to objectively gauge its own effectiveness at the end of the year.

In all observed meetings and interactions, the board, network, and school leadership teams appeared to have a positive and productive working relationship. The Executive Director and COO were self-reflective and proactive, allowing for relevant and transparent meetings that demonstrated a constant commitment to school improvement. For all of the reasons described above, the Excel Center receives a **Meets Standard** for school and board environment.

3.5. Does the school comply with applicable laws, regulations, and provisions of the charter agreement relating to the safety and security of the facility?							
Indicator Targets	Does not meet standard		The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.				
	Approaching standard		The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.				
	Meets standard		The school complies with and presents no concerns in the sub-indicators below.				
	Exceeds standard		The school consistently and effectively complies with and presents no concerns in the sub-indicators below.				
3.5 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS	MS					
Sub-indicator Ratings	Sub-indicators						Rating
	Health and safety code requirements						MS
	Facility accessibility						MS
	Updated safety and emergency management plans						MS
	A facility that is well suited to meet the curricular and social needs of the students, faculty, and members of the community						MS

In 2014-15, the Excel Center West facility met all health and safety code requirements and provided a safe environment conducive to learning. Although they had to utilize mobile units while renovations were being done, they took all proper safety precautions. The design, size, maintenance, security, equipment and furniture of the facilities were all adequate to meet the school's needs. The school was accessible to all, including people with physical disabilities. The Mayor's Office monitoring of Excel Center West's compliance with health and safety code requirements did not reveal any significant concerns related to these obligations. Accordingly, it receives a Meets Standard for this indicator for 2014-15.

3.6. Is the school meeting its school-specific non-academic goals?							
Indicator Targets	Does not meet standard		The school does not meet standard on either school-specific non-academic goal.				
	Approaching standard		School is 1) approaching standard on one school-specific non-academic goal, while not meeting standard on the second goal, 2) approaching standard on both school-specific non-academic goals, OR 3) meeting standard on one school-specific non-academic goal, while approaching standard on the second goal.				
	Meets standard		School is 1) meeting standard on both school-specific non-academic goals, OR 2) meeting standard on one school-specific non-academic goal while exceeding standard on the second goal.				
	Exceeds standard		School is exceeding standard on both school-specific non-academic goals.				
3.6 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	NA	AS					
School-Specific Goals	Sub-indicators						Rating
	Graduates of the Excel Center will earn greater than \$10.50 per hour if on a career track.						AS
	Excel Center will retain 90% of staff rated "effective" during the 2015-2016 school year.						AS

Each year, Mayor-sponsored charter schools set two non-academic goals that are aligned to or support the school's unique mission. All data for school-specific goals is self-reported by the individual school.

In the 2014-15 school year, Excel Center West set its first goal around graduate wages. The school reported that the average earnings for graduates on a career track were \$9.63, earning the school a rating of **Approaching Standard** on its first goal.

Excel Center West set its second goal around teacher retention. During the 2014-2015 school year, Excel Center West reported that 83% of its staff was retained within the network, and thus receives an **Approaching Standard** on its second goal.

Overall, due to the ratings of the individual goals above, Excel Center West receives an **Approaching Standard** on this indicator for the 2014-15 school year.